

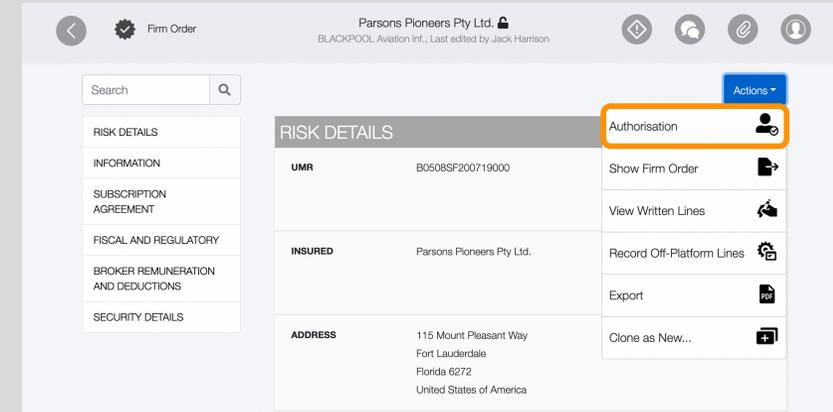
# Contract Authorisation

**Intro.** Contract Authorisation allows teams to collaboratively review contracts during the placement process. If authorisation is set up as mandatory, only authorised risks can be actioned.

Authorisation can be set up as optional or mandatory for **brokers** showing drafts, firm orders, and endorsements to carriers.

Authorisation can be set up as optional or mandatory for **underwriters** sending quotes, stamping firm orders, and agreeing endorsements.

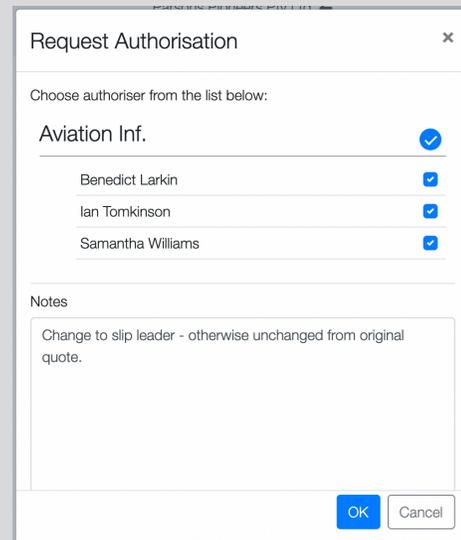
1. The authorisation option appears in the actions menu for unauthorised contracts.



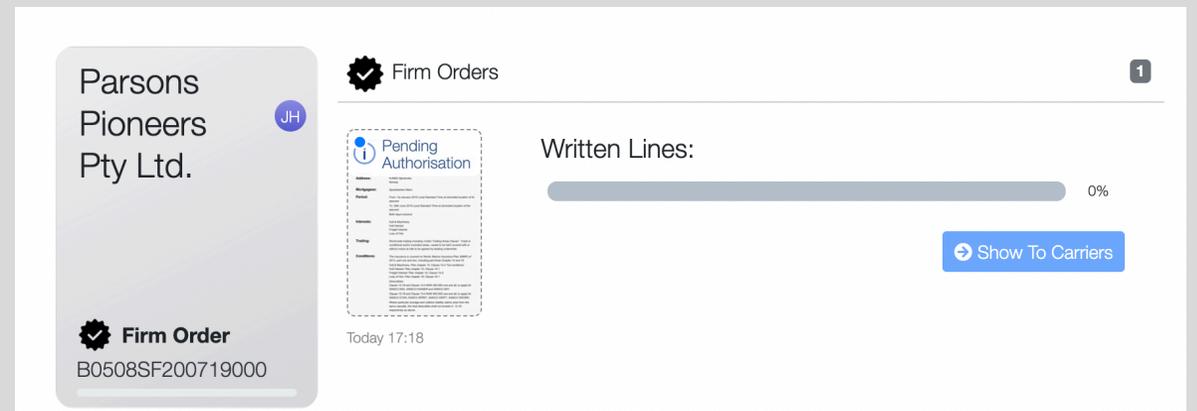
2. The request authorisation menu allows you to request authorisation from users in your team.

Only users who have been set up as authorisers for your team appear in this list (see page: *How to set up Contract Authorisation*).

Select the authoriser(s) and add further information in the notes textbox (optional). Click OK to send the authorisation request.

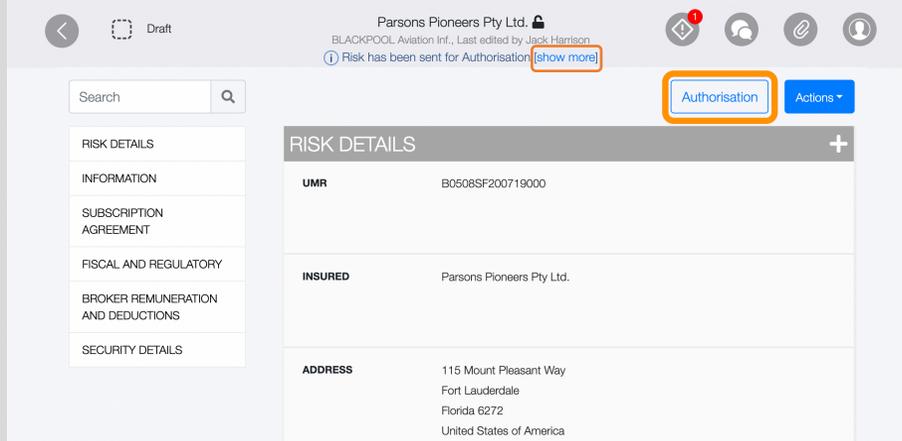


3. All selected authorisers will receive the contract with pending authorisation.



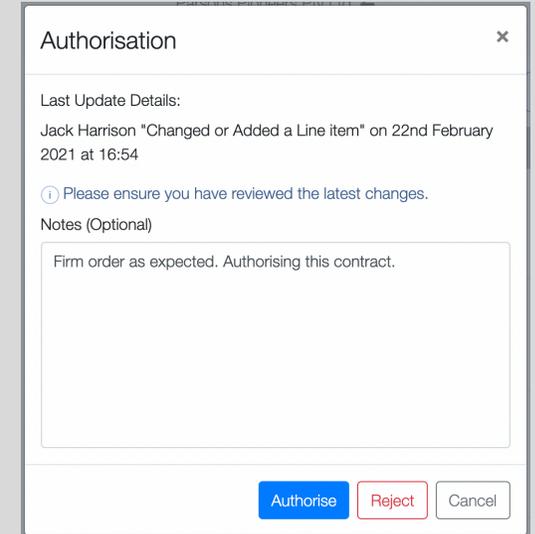
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4. As the authoriser, enter the contract and select the Authorisation button or use the Show More button to view the authorisation request information.

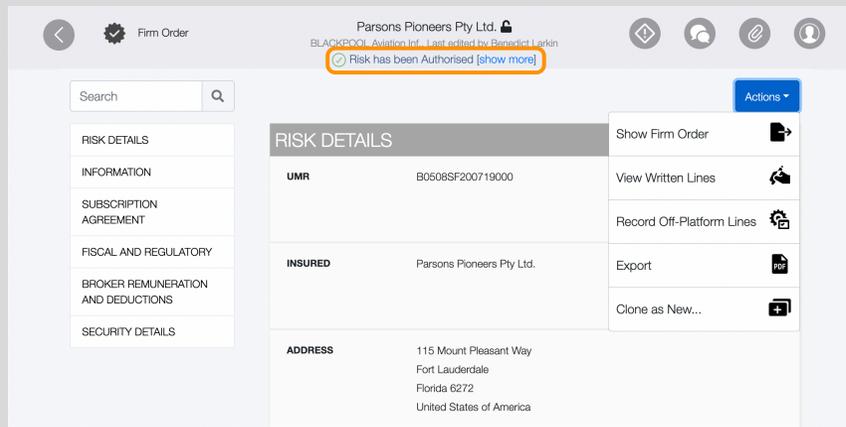


5. The authoriser can edit the contract directly and can authorise or reject the contract with or without notes.

If the authoriser rejects the contract, you can edit the contract and send another authorisation request.



6. Once the risk is authorised, all actions are available in the contract. Use the Show More button to view authorisation information at any time.



- N.B.** If contract authorisation is mandatory, other actions will not be available in the contract until the contract is authorised.

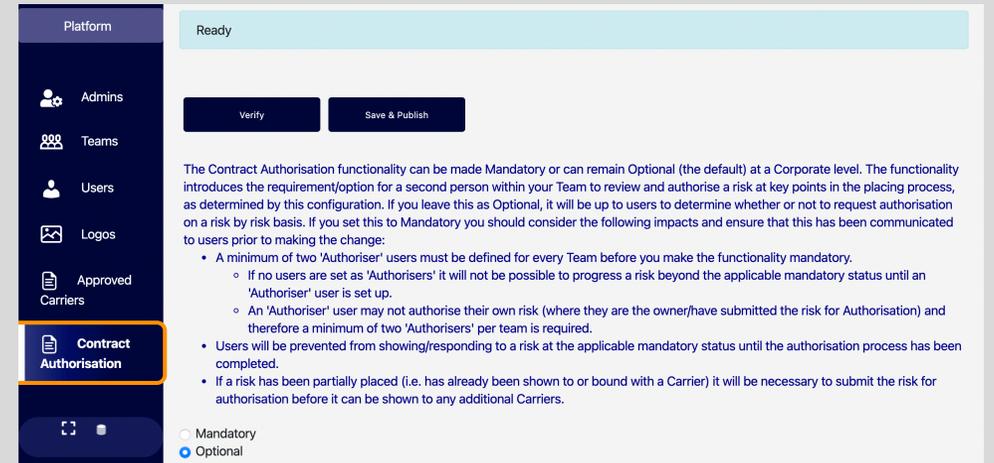
If contract authorisation is optional and a risk is sent for authorisation, other actions will not be available in the contract while authorisation is pending.

# How to set up Contract Authorisation (for Administrators)

**Intro.** Contract Authorisation is set up in the admin portal. Administrators can set up authorisers on a per team basis within their organisation.

As authorisation is optional, users do not have to be set up as authorisers. However, at least one authoriser is required in a team for authorisation to work.

1. Navigate to the Admin portal and select the Contract Authorisation tab.



The Contract Authorisation functionality can be made Mandatory or can remain Optional (the default) at a Corporate level. The functionality introduces the requirement/option for a second person within your Team to review and authorise a risk at key points in the placing process, as determined by this configuration. If you leave this as Optional, it will be up to users to determine whether or not to request authorisation on a risk by risk basis. If you set this to Mandatory you should consider the following impacts and ensure that this has been communicated to users prior to making the change:

- A minimum of two 'Authoriser' users must be defined for every Team before you make the functionality mandatory.
  - If no users are set as 'Authorisers' it will not be possible to progress a risk beyond the applicable mandatory status until an 'Authoriser' user is set up.
  - An 'Authoriser' user may not authorise their own risk (where they are the owner/have submitted the risk for Authorisation) and therefore a minimum of two 'Authorisers' per team is required.
- Users will be prevented from showing/responding to a risk at the applicable mandatory status until the authorisation process has been completed.
- If a risk has been partially placed (i.e. has already been shown to or bound with a Carrier) it will be necessary to submit the risk for authorisation before it can be shown to any additional Carriers.

Mandatory  
 Optional

2. Authorisation can be set up as optional or mandatory. When set to mandatory, authorisation is only required on the selected contract types, which can be ticked or unticked as an administrator.

## Broker

Mandatory  
 Optional

For which stages should such contract authorisation be mandatory?

Draft  
 Draft Firm Order  
 Endorsement

## Underwriter

Mandatory  
 Optional

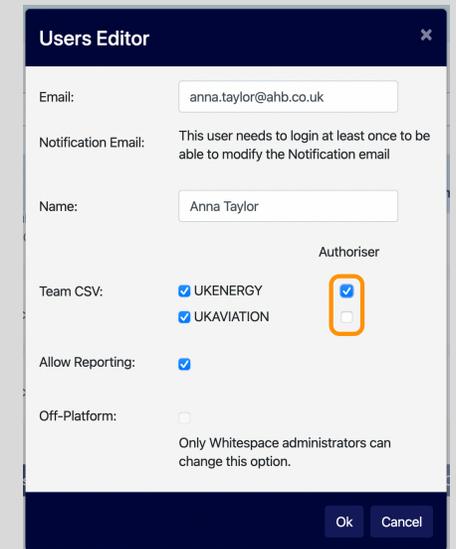
For which stages should such contract authorisation be mandatory?

Quote  
 Firm Order  
 Endorsement

3. In the Users tab, select a user and tick the Authoriser checkbox on a per team basis.

Users can be authorisers in any team they are part of.

Click Ok and then click Save & Publish to confirm your changes.



**Users Editor**

Email:

Notification Email:

Name:

Authoriser

Team CSV:  UKENERGY  UKAVIATION

Allow Reporting:

Off-Platform:

Only Whitespace administrators can change this option.